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graphic arts monthly®

THE MAGAZINE OF THE PRINTING INDUSTRY

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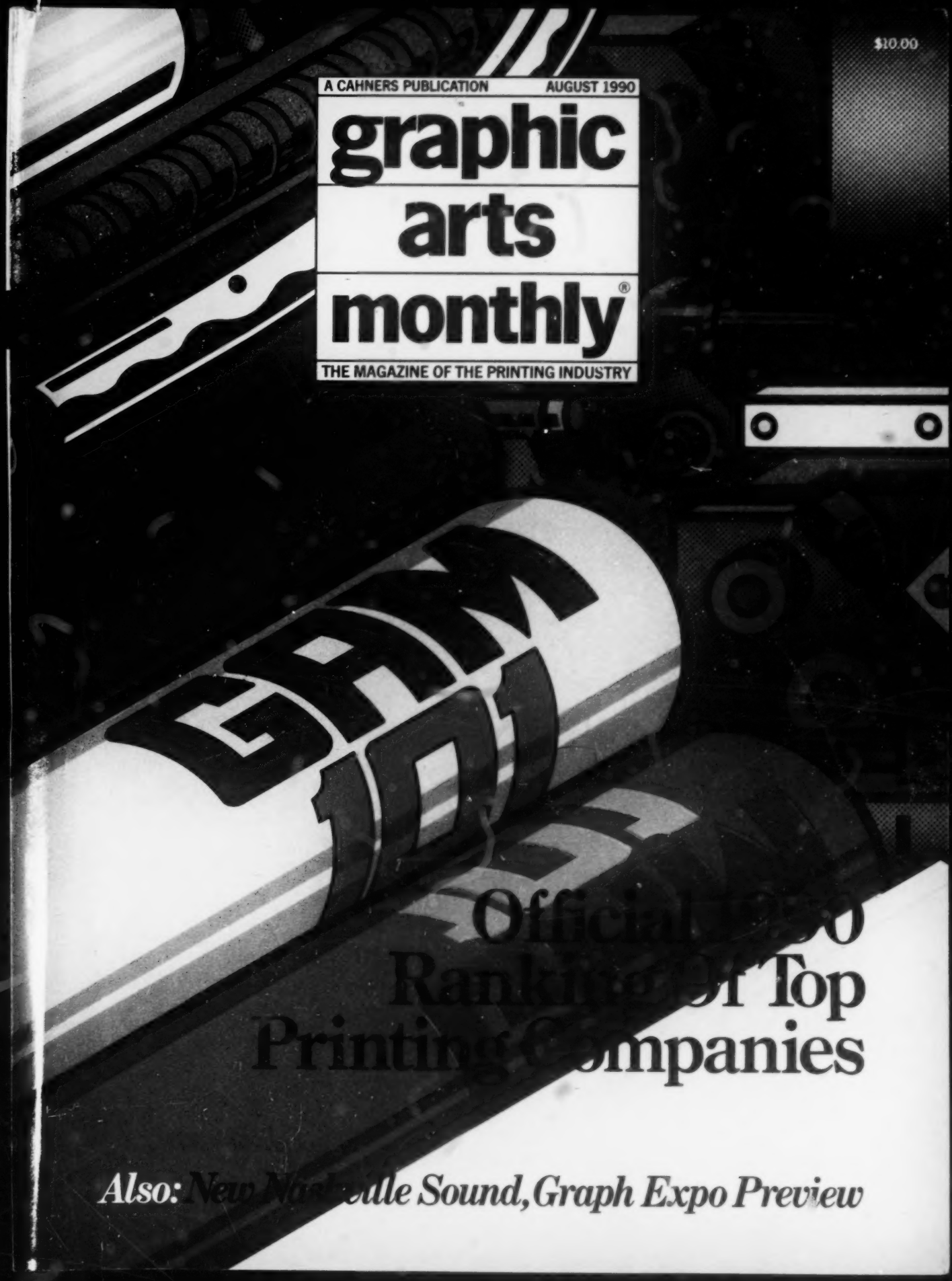

GAM 101

Official [illegible] Ranking of Top Printing Companies

Also: New Nashville Sound, Graph Expo Preview

VOLUME 62, NUMBER 8

A CAHNERS PUBLICATION AUGUST 1990

graphic arts monthly

THE MAGAZINE OF THE PRINTING INDUSTRY

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By Bill Esler

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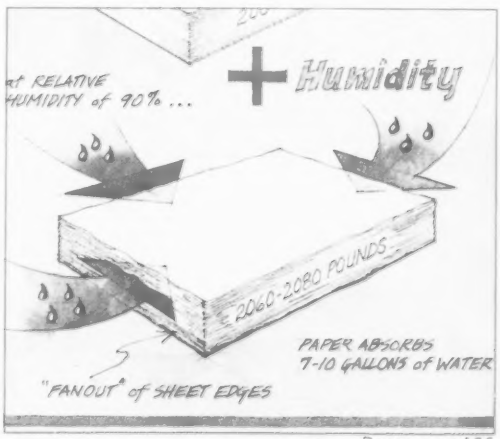

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Price Indexes Show Inflation Slowing, But Not Enough

Recent weakness in the economy has helped slow price inflation. In turn, reduced concern over inflation resulted in lowering interest rates. This slowdown in inflation has not been convincing enough, however, as the Federal Reserve Board has refused to play a role in further easing interest rates.

Consumer prices fell to a 2.8% annual rate in May, following the 7.8% annual growth rate during the first quarter, the highest rate since spring 1982. Year-to-date data rose 4.8% gain above the same period in 1989, slightly below the 5.0% increase in the first five months of 1989.

Further declines in consumer prices can be expected based on progress seen on the wholesale side. The producer price index for finished goods was virtually unchanged in the first half of months of 1989 and is expected to log in at 4.3% for the year. Likewise, the PPI for intermediate goods has fallen from a 4.6% rate of increase in 1989 to a projected 1.5% rise in 1990.

These favorable producer numbers will translate into good news for consumers. Although the consumer price index is expected to rise 4.7% in 1990, look for prices to increase just 3.8% in 1991.

Interest rates have seen slight declines from their peak in early-1989. In particular, the prime rate, registering at 10% for the past four months, is much lower than its peak level of 11.5% a year ago.

Despite the recent quell of inflationary fears, however, the Fed has decided against easing interest rates until there is more evidence of weakness in the economy and lower inflation.

Nonetheless, market rates are still expected to trend downward through the fall of this year. Cahners Economics expects another half point drop in the prime rate by year-end.

The Federal Reserve Board recently revised and rebased the industrial production series to an index of 1987 = 100. The impact on printing and publishing production was quite dramatic. Year-end 1989 levels declined from a previous 9.1% gain over 1988 to a more reasonable 4.8% rise. These trends are more reasonale because they put printing and publishing back in line with overall economic trends, the dominant factor driving activity in this industry. Cahners projects industry output to rise 4.1% this year, followed by a forecast 8.1% gain in 1991.

GENERAL ACTIVITY INDICATORS

				Annual Percent Change			
General Economic Indicators	**Q1/89**	**Q4/89**	**Q1/90**	**1989**	**1990**	**1991**	**1992**
	Apr 89	**Mar 90**	**Apr 90**	**1989**	**1990**	**1991**	**1992**

Making Progress

With a few exceptions, the chief companies on our annual ranking reflect today's business patterns.

For printing companies operating at the very top layer of the industry, fiscal 1989-90 began to reflect a general slowdown in business activity compared to the previous year. In our 1990 ranking of 101 leading firms, about 40 reported gross sales of 10% or more, down from the more than half who reported double-digit gains in last year's ranking.

Also rising was the number of printers reporting either no gain or a negative percentage change in year-over-year sales comparison; the count went from 15 last year to 20 this year. In turn, that leaves about 40 on the main GAM 101 list who reported positive sales gains of 9% or less.

At issue in this situation, of course, is the impact that such a slowdown has on company earnings and profits and the trickle-down effect on reinvestment and capital expansion. All of these indicators are beyond the scope of this study.

However, lest we misinterpret this slowdown for a major business slump, it should be pointed out how solid the North American printing base is and how decent is its fiscal performance as measured in terms of annual sales, particularly when compared to other large industries. Major players in many other fields would be proud to have posted such gains in fiscal 1989-90 over fiscal 1988-89.

Data for virtually all the listings were obtained from the companies themselves, most often in response to a mailed questionnaire, but sometimes obtained by telephone and facsimile machine. In a few cases, sales figures had to be estimated because of accounting practices, nondisclosure policies, or because recent major acquisitions made simple sales-figure comparisons impossible or meaningless.

Readers should note that direct comparisons of company sales figures and performances are not advised; some reasons are obvious—commercial printers include billings for paper while publication printers do not—and others relate to unusual events such as acquisitions or divestitures, reporting methods, and changes in fiscal reporting periods.

Respondents are always asked for figures for the most recent fiscal year. Also, currency conversions were necessary for Canadian firms; for this, a common factor was applied throughout.

Finally, in certain closely integrated operations, it remains impossible to separate printing revenues from other income, which blurs direct comparisons.

Despite these necessary qualifications, the 1990 GAM 101 list stands as the industry's best ranking of major printing firms, given the constraints of time and the privately-held nature of the industry. With ongoing business consolidations, some familiar names no longer appear and a few others asked not to be included.

Special thanks go to Associate Editor Lisa Cross for her tireless efforts in compiling this year's listing. Others heavily involved in the project were Assistant Editor Bridget Kinsella, Editor Roger Ynostroza, and Art Director Karen Lehrer.

If the detachable 1990 GAM 101 double-gatefold form facing this page is missing, you can obtain a copy by sending $5.00—payment with order, please—to Carol Bien, Reprint Services—Cahners Publishing Company, 1350 E. Touhy Ave., Des Plaines, IL 60018. ▤

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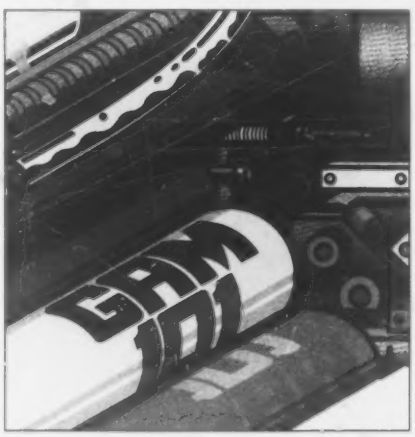
arts
monthly

GAM 101
Official Industry Ranking Of The Top Printing Firms

This detachable double-gatefold form contains the 1990 official ranking of the 101 largest printing companies in North America, ranked by sales volume for their most recently completed fiscal year, along with salient information for each firm that's listed.



In addition, there are listings of the top business forms printers, greeting card manufacturers, and color trade shops. These rankings are maintained separately in an effort to avoid distortion of the main list, which concentrates on commercial printers and publication-type printers.

Data for virtually all the listings were obtained from the companies themselves. A few firms projected their sales figures or offered estimates, either because of accounting practices or because of recent acquisitions. For Canadian companies, a single currency exchange rate was applied.

A word of caution: Use of the data to make direct comparisons can be very misleading, even though every effort has been made to exclude nonprinting revenues. The biggest discrepancy: commercial printers generally include billings for paper, while publication printers customarily do not. These qualifications notwithstanding, we believe the GAM 101 ranking is the best available overview of the industry's leaders.

Additional copies of the 1990 GAM 101 are available for $5.00 each; send payment with order to Carol Bien, Reprint Services—Cahners Publishing Company, 1350 E. Touhy Ave., Des Plaines, IL 60018.

RANKING BY EMPLOYEE

1	R. R. Donnelley	26,100	34 Lehigh Press	1,000	67 Universal Printing	450
2	Deluxe Corp.	16,948	35 Publishers Press	1,000	68 Wisconsin Color	450
3	Quebecor Printing	10,700	36 Shorewood Packaging	980	69 Standard Publishing	439
4	Lawson Mardon	7,500	37 Monroe Printing	940	70 Anderson Lithograph	435
5	Arcata Graphics	7,200	38 Ivy Hill	900	71 AGI Incorporated	430
6	World Color Press	6,400	39 Serigraph, Inc.	900	72 Arandell-Schmidt	410
7	Ringier America	5,800	40 Queens Group	870	73 Avanti Press	400
8	John H. Harland	5,600	41 Fleming Packaging	800	74 Henry Wurst	400
9	Sullivan Graphics	5,000	42 Hart Graphics	750	75 Williamson Printing	400
10	Quad/Graphics	4,800	43 The Sheridan Press	720	76 Noll Printing	394
11	Southam Graphics	4,200	44 Shea Communication	700	77 L.P. Thebault Co.	375
12	Clarke American	4,000	45 Merrill Corp.	660	78 Riverside Press	375
13	Banta Corporation	3,650	46 Combined Communication	650	79 Latham Process	363
14	Continental Graphics Holdings	3,600	47 Graphic Arts Center	650	80 Century Graphics	350
15	Jostens	3,500	48 Graphisphere	650	81 Fort Dearborn Litho	350
16	Treasure Chest	3,400	49 Cairn Capital	635	82 Meehan-Tooker	350
17	Trans-Continental	3,208	50 K/P Companies	625	83 Japs-Olson Co.	343
18	Meredith/Burda	3,200	51 Mack Printing	622	84 Danbury Printing	339
19	Graphic Industries	3,070	52 Alford Industries	620	85 S. Rosenthal & Co.	328
20	Brown Printing	3,000	53 Webcrafters	620	86 Northeast Graphics	325
21	Western Publishing	2,500	54 Moebius Printing	611	87 Neenah Printing	309
22	American Signature	2,480	55 Waverly Press	610	88 ColorGraphics	300
23	Cadmus Communications	1,900	56 United States Banknote	600	89 Vernon Company	300
24	Bowne & Co.	1,700	57 Danner Press Press of Ohio	570	90 John D. Lucas	295
25	Perry Printing	1,650	58 Empery Corp.	560	91 Printco	290
26	Engraph	1,330	59 Edwards Brothers	550	92 Lasky Company	277
27	Taylor Publishing	1,300	60 Graftek Press	546	93 Daniels Printing	260
28	Valassis Inserts	1,204	61 Gulf Printing	529	94 Kukla Press	251
29	Courier Corp.	1,200	62 Keller-Crescent	520	95 Berlin Industries	250
30	Stevens Graphics	1,200	63 George Rice & Sons	477	96 Retail Graphics Printing	250
31	Bertelsmann	1,100	64 Spencer Press	470	97 Penn Lithographics	230
32	Instant Web Companies	1,100	65 Continental Web Press	450	98 Sandy Alexander	225
33	Judd's	1,050	66 Petty Co.	450	99 Editors Press	220
					100 Pacific Lithograph	206
					101 Sayers Printing	185

BUSINESS FORMS PRINTERS

Rank, Name (Parent), Location	Sales Most Recent Fiscal Year (000)	Change (%)	Em-ployees	CEO
1 **Moore Corporation Limited**[1], Toronto, Ont.	$2,317,849	+ 6	26,360	M.K. Goodrich
2 **Standard Register Company**[1], Dayton, OH	708,876	+ 5	6,271	J.K. Darragh
3 **Uarco, Inc. (Settsu Corp.)**, Barrington, IL	500,000	– 5	4,500	H.L. Koelling
4 **Wallace Computer Services Inc.**[1], Hillside, IL	429,008	+ 12	3,000	T. Dimitriou
5 **American Business Products**[1], Atlanta, GA	387,140	+ 8	4,000	T. Carmody
6 **Reynolds & Reynolds**[1], **Business Forms Div.**, Dayton, OH	348,900	– 1	4,000	R.C. Nevin
7 **Duplex Products Inc.**[1], Sycamore, IL	326,475	+ 9	2,690	C.L. Peterson
8 **New England Business Service**[1], Groton, MA	225,931	+ 12	2,000	R.H. Rhoads
9 **SCM Allied Paper Inc.**, Dayton, OH	147,000	+ 2	700	W.H. Ames
10 **Ennis Business Forms Inc.**[1], Ennis, TX	129,606	+ 1	1,500	K.A. McCrady
11 **Office Electronics**, Itasca, IL	104,497	+ 20	500	M.S. Briggs
12 **Shade Computer Forms Co.**, Green Bay, WI	89,300	+ 16	264	J.L. Kemerling
13 **General Business Forms, Inc.**, Skokie, IL	87,700	+ 4	682	R.S. Kuntz
14 **Transkrit (Maclean Hunter, Inc.)**, Brewster, NY	87,398	+ 5	900	F. Neubauer

THE GAM 101: C

Rank, Name, (Parent Company

1 **R.R. Donnelley & Sons**[1], Ch
2 **Quebecor Printing**[1], Montre
3 **Deluxe Corporation**[1], St. Pa
4 **Lawson Mardon**[1], Mississaug
5 **World Color Press (Kohlberg**
Effingham, IL
6 **Ringier America (Ringier AG,**
7 **Sullivan Graphics**, Brentwood
8 **Banta Corporation**[1], Menasha
9 **Treasure Chest Advertising**, G
10 **Valassis Inserts (Consolidate**
Livonia, MI
11 **Arcata Graphics Company**, Ba
12 **Meredith/Burda**, Des Moines
13 **Southam Graphics Group**[1], To
14 **Western Publishing**, Racine, W
15 **Quad/Graphics**, Pewaukee, W
16 **Brown Printing (Gruner + Ja**
17 **John H. Harland Company**[1], A
18 **American Signature (ASG Acc**
Memphis, TN
19 **Trans-Continental Printing**[1], (
Group), St.-Laurent, Quebec
20 **Graphic Industries**[1], Atlanta, G
21 **Continental Graphics Holding**
22 **Clarke American**[1] **(M.B. Ame**
23 **Engraph**[1], Atlanta, GA
24 **Bowne & Company**[1], New Yor
25 **Perry Printing (Journal Comm**
Waterloo, WI
26 **Stevens Graphics**, Atlanta, GA
27 **Cadmus Communications**[1], R
28 **Lehigh Press**, Cherry Hill, NJ
29 **Jostens**[1], Minneapolis, MN
30 **Shorewood Packaging**[1], Farm
31 **Graphic Arts Center**, Portland
32 **Judd's Incorporated**, Washing
33 **Bertelsmann Printing & Mfg.**
34 **Graphisphere Corp.**, Des Plai
35 **Queens Group**, Long Island C
36 **Shea Communication**, Louisv
37 **Keller-Crescent**, Evansville, I
38 **Gulf Printing (Southwestern**
39 **George Rice & Sons**, Los Ang
40 **Instant Web Companies**, Cha
41 **Moebius Printing**, Milwaukee
42 **Fleming Packaging**, Peoria, I
43 **Courier Corporation**[1], Lowell
44 **Meehan-Tooker, Inc.**, East Ru
45 **Anderson Lithograph**, Los An
46 **Ivy Hill**[1] **(Time-Warner)**, New
47 **Taylor Publishing (Insilco)**, D
48 **Alford Industries (Kane Indus**
Park, NJ
49 **Arandell-Schmidt (Arandell**
Falls, WI

FICIAL RANKING

Location	Sales Most Recent Fiscal Year (000)	Sales Previous Fiscal Year (000)	Change (%)	Employees	Sales Per Employee	Sites	Press Units: Sheetfed, Web Offset, Gravure, Other	Primary Products	CEO	Years in Business
ago, IL	$3,122,331	$2,878,432	+ 8	26,100	$119,629	34	*	COM	J.R. Walter	126
Quebec	1,454,857**	647,839	+ 124	10,700	135,968	58	386,686,334,37[2]	COM, BK, PUB	J. Neveu	1
, MN	1,315,828	1,195,971	+ 10	16,948	77,639	79	*	SPC	H.V. Haverty	75
a, Ont	853,849**	950,392	− 10	7,500	113,847	51	*	COM,SPC	L.G. Tapp	108
Kravis Roberts & Co.),										
	686,098	654,518	+ 5	6,400	107,203	8	0,525,197,12[2]	PUB	J.A. Dawson	87
Zurich), Itasca, IL	665,000	610,000	+ 9	5,800	114,655	12	*	PUB	E.C. Nytko	97
, TN	650,000	575,000	+ 13	5,000	130,000	15	12,92,0,60[3]	BK,INS	J.T. Sullivan	2
, WI	568,000	526,000	+ 8	3,650	155,616	11	*	COM,PUB,INS	C.W. Aurand Jr.	89
lendora, CA	550,000	540,000	+ 2	3,400	161,765	14	*	COM,PUB,INS	S.G. Scheller	23
d Press U.S.),										
	524,000	400,000	+ 31	1,204	435,216	3	5,61,0	INS	D.A. Brandon	21
ltimore, MD	523,000	516,000	+ 1	7,200	72,639	10	*	COM,BK,PUB	E.L. Scarff	85
IA	502,000	453,000	+ 11	3,200	156,875	7	0,50,164	COM	W. Voss	21
ronto, Ont	501,430	472,477	+ 6	4,200	119,388	15	*	COM,INS,PUB	M.A. Quinn	113
WI	410,000	470,000	− 13	2,500	164,000	4	52,26,0,10[2]	COM,PUB	W.O. Nahikian	83
VI	400,000	350,000	+ 14	4,800	83,333	5	0,156,20	PUB	H.V. Quadracci	19
hr), Waseca, MN	383,000	365,000	+ 5	3,000	127,666	4	0,241,30	PUB,CAT,INS	J.K. Rifenbergh	33
Atlanta, GA	344,700	333,300	+ 3	5,600	61,554	43	*	SPC	J.W. Robinson	67
quisition Corp.),										
	337,149	315,410	+ 7	2,480	135,947	6	22,204,0	PUB	T.A. Tevis	3
(GTC Transcontinental										
	313,564	278,990	+ 12	3,208	97,744	12	295	COM	R. Marcoux	14
GA	310,330	270,212	+ 15	3,070	101,085	40	350,208,0,36[2]	COM	M.C. Pope III	20
s, Los Angeles, CA	303,000	291,000	+ 4	3,600	84,170	12	*	COM,BK	C.F. Bourland	2
rica), San Antonio, TX	260,000**	N.A.	N.A.	4,000	65,000	49	*	SPC	J.E. Coln	116
	203,000	150,600	+ 35	1,330	152,632	8	*	SPC	L. Benatar	57
k, NY	189,577	187,826	+ 1	1,700	111,520	20	*	FIN	R.H. Koontz	215
nunications),										
	178,900	161,600	+ 11	1,650	108,424	6	6,22,4	COM	R.L. Perry	59
A	173,000	155,000	+ 12	1,200	144,167	5	44,30,0,4[2]	DIR	H.M. Inman	93
Richmond, VA	168,000**	160,800	+ 4	1,900	88,420	10	109,46,0,5[2]	COM,PUB	W. Stettinius	6
	161,400	153,600	+ 5	1,000	161,400	6	43,67,0,3[4]	COM	J.D. DePaul	66
	153,000	125,000	+ 25	3,500	61,200	6	138,0,0	BK	H.W. Lurton	93
hingdale, NY	139,300	127,100	+ 10	980	142,143	6	*	SPC	P.B. Shore	24
, OR	130,000**	119,000	+ 9	650	200,000	1	38,33,0	COM	F.M. Stammers	95
gton, D.C.	114,100	108,100	+ 6	1,050	108,667	3	8,66,0	BK,PUB	T.A. Manning	122
Corp., Berryville, VA	114,000	95,000	+ 20	1,100	103,636	4	57,33,0,1[2]	BK	R. Hampp	3
nes, IL	110,000	96,000	+ 15	650	169,230	3	41,27,0	COM	G.R. Dorn	26
ty, NY	110,000	102,000	+ 8	870	126,437	4	72,22,0,2[3]	SPC	E. Kaltman	58
ville, KY	106,918	120,000	− 11	700	152,740	3	0,40,39	COM,PUB,CAT	M.D. Shea	2
N	106,541	110,254	− 3	520	204,887	1	40,0,0,9[2],5[12]	COM, SPC	T.M. Smythe	105
Bell), Houston, TX	105,000	75,000	+ 40	529	198,487	4	27,44,0,3[2]	COM	R.D. Cashman	74
geles, CA	103,287	96,483	+ 7	477	216,535	1	30,24,0	COM	E. Grossberg	111
nhassen, MN	98,000**	90,000	+ 9	1,100	89,090	4	0,62,0	COM,SPC	J. Carlson	21
, WI	98,000	75,000	+ 31	611	160,393	3	19,50,0	COM	M.C. McDonough	79
L	95,112	97,590	− 3	800	118,890	11	67,13,9,13[2],34[12]	SPC	T.J. Fleming	56
, MA	95,951	81,769	+ 17	1,200	79,960	5	10,34,0	BK	J.F. Conway Jr.	166
utherford, NJ	95,000	80,000	+ 19	350	271,430	3	35,43,0	COM	M.D. Voss	4
ngeles, CA	93,000	90,000	+ 3	435	213,790	1	36,24,0	COM	G.T. Parana	39
York, NY	93,000	71,000	+ 31	900	103,333	4	113,0,0	COM,SPC	E. Kern	76
allas, TX	87,800	86,800	+ 1	1,300	67,540	4	58,0,0	BK	F.P. Perliski	51
stries), Ridgefield										
	86,389	87,277	− 1	620	139,340	4	36,0,53,10[2],38[12]	SPC	D. Moir	88
Corp.), Menomonee										
	85,407	73,505	+ 16	410	208,310	1	0,24,0	COM	F.E. Treis	68

THE GAM 101: OFFICIAL RANKING

Rank, Name, (Parent Company), Location	Sales Most Recent Fiscal Year (000)	Sales Previous Fiscal Year (000)	Change (%)	Employees	Sales Per Employee	Sites	Press Units: Sheetfed, Web Offset, Gravure, Other	Primar Produc
50 Empery Corporation (Ferguson), Paoli, PA	85,000	72,000	+ 18	560	151,790	7	2,60,0,120[2],62[12]	SPC
51 Continental Web Press, Itasca, IL	75,000	65,000	+ 15	450	166,670	1	0,44,0	COM
52 Monroe Printing Company, East Stroudsburg, PA	72,800	70,500	+ 3	940	77,450	4	46,53,0	PUB
53 Publishers Press, Inc. (Publishers Printing), Louisville, KY	$72,000	$63,000	+ 14	1,000	$ 72,000	2	16,58,0	PUB
54 Hart Graphics, Austin, TX	71,540**	58,152	+ 23	750	95,390	3	50,36,0,17[8]	COM
55 Petty Co., Inc., Effingham, IL	71,000	65,000	+ 9	450	157,780	2	1,63,0	COM
56 Retail Graphics Printing (RGP Corp.), Dallas, TX	70,000**	54,000	+ 30	250	280,000	2	0,40,0	INS
57 Merrill Corporation[1], St. Paul, MN	69,022	63,394	+ 9	660	104,580	15	26,21,0,1[2]	FIN,SPC
58 Danner Press/The Press of Ohio, Canton, OH	64,000	63,300	+ 1	570	112,280	2	11,41,0	PUB,CA
59 United States Banknote, New York, NY	60,000	60,000	0	600	100,000	3	45,18,5,24[7],9[7]	SPC
60 Webcrafters, Madison, WI	60,000	62,000	− 3	620	96,770	2	0,54,0	BK
61 Combined Communication, Lisle, IL	58,300	55,586	+ 5	650	89,690	2	6,40,0	PUB
62 Berlin Industries (Smith Investment), Addison, IL	58,000	58,000	0	250	232,000	2	0,44,0	COM
63 L.P. Thebault Company, Parsippany, NJ	58,000**	54,000	+ 7	375	154,670	1	30,12,0	COM
64 Vernon Company, Newton, IA	57,000	57,000	0	300	190,000	3	7,0,0,5[7]	SPC
65 Serigraph, Inc., West Bend, WI	56,000	51,000	+ 10	900	62,220	3	7,0,0,33[4]	SPC
66 Lasky Company, Milburn, NJ	55,000	53,000	+ 4	277	198,560	1	22,23,0	COM
67 Spencer Press, Wells, ME	55,000**	53,200	+ 3	470	117,020	1	0,27,0	CAT
68 Mack Printing, Easton, PA	54,433	57,216	− 5	622	87,510	1	15,29,0	PUB
69 Cairn Capital Inc., Don Mills, Ont.	53,059**	54,309	− 2	535	83,560	7	*	COM
70 K/P Companies, Berkeley, CA	52,518	54,767	− 4	625	84,030	18	*	COM
71 Edwards Brothers, Ann Arbor, MI	52,000**	46,000	+ 13	550	94,500	2	*	BK
72 Henry Wurst Inc., North Kansas City, MO	52,000	47,000	+ 11	400	130,000	2	0,35,0	COM
73 The Sheridan Press (Sheridan Group), Hanover, PA	51,700	45,700	+ 13	720	71,810	2	26,0,0	PUB
74 Avanti Press, Miami, FL	51,000	42,500	+ 20	400	127,500	1	0,18,0	COM,CA
75 ColorGraphics, Los Angeles, CA	51,000	52,000	− 2	300	170,000	3	26,23,0	COM
76 Fort Dearborn Lithographic Co., Chicago, IL	50,508	48,000	+ 5	350	144,310	1	44,0,0	COM,SP
77 Century Graphics, Metairie, LA	50,000	44,217	+ 13	350	142,860	2	0,24,0	INS
78 Williamson Printing, Dallas, TX	50,000	40,000	+ 25	400	125,000	2	35,24,0,6[7]	COM
79 Printco, Greenville, MI	49,018	44,207	+ 11	290	169,030	2	0,40,0	INS
80 Danbury Printing & Litho, Danbury, CT	48,000	48,200	0	339	141,590	1	17,36,0,1[2]	COM
81 Northeast Graphics, North Haven, CT	46,000	35,000	+ 31	325	141,540	1	17,43,0	INS
82 Noll Printing (Our Sunday Visitor), Huntington, IN	45,200	45,137	0	394	114,720	1	0,39,0	CAT
83 Waverly Press[1] (Waverly, Inc.), Baltimore, MD	44,710	45,315	− 1	610	73,300	2	27,12,0	PUB
84 Kukla Press, Inc., Elk Grove Village, IL	44,000	40,000	+ 10	251	175,300	2	0,50,0	COM
85 Universal Printing, St. Louis, MO	44,000	42,000	+ 5	450	97,780	2	38,13,0,7[2]	COM
86 Graftek Press[1] (Devon Group), Woodstock, IL	43,296	40,060	+ 8	546	79,300	3	16,52,0	PUB
87 Sandy Alexander[1] (Mickelberry Corp.), Clifton, NJ	43,252	42,856	+ 1	225	192,230	1	25,16,0	COM
88 The Riverside Press, Dallas, TX	42,000	40,800	+ 3	375	112,000	4	38,6,0,6[7]	COM,SP
89 Japs-Olson Company, Minneapolis, MN	40,650	34,600	+ 17	343	118,510	2	54,113,0,3[7],26[13]	COM
90 AGI Incorporated, Melrose Park, IL	40,000	33,000	+ 21	430	93,020	1	*	COM,SP
91 Pacific Lithograph, San Francisco, CA	40,000	36,500	+ 10	206	194,170	1	31,24,0	COM,SP
92 Wisconsin Color Press, Milwaukee, WI	40,000	40,000	0	450	88,890	1	4,41,0	PUB
93 S. Rosenthal & Co., Cincinnati, OH	36,400	33,900	+ 7	328	110,980	1	10,32,0	PUB,CA
94 Daniels Printing, Everett, MA	36,000	37,200	− 3	260	138,460	1	38,4,0,5[7]	COM,FIN
95 Latham Process Corp.[1], New York, NY	36,000**	34,233	+ 3	363	99,170	2	12,32,0	COM
96 Penn Lithographics (JSJ Corp.), Cerritos, CA	35,000**	31,515	+ 11	230	152,170	1	21,22,0	COM
97 Editors Press (Kiplinger), Hyattsville, MD	34,000	33,000	+ 3	220	154,550	1	4,25,0	PUB
98 Sayers Printing Company (Graphic Innovators), St. Louis, MO	33,800	30,000	+ 13	185	182,700	2	18,22,0	COM
99 Standard Publishing[1] (Standex), Cincinnati, OH	33,786	37,789	− 11	439	76,960	1	8,12,0	COM
100 John D. Lucas Printing, Baltimore, MD	33,300	32,300	+ 3	295	112,880	1	23,22,0,2[2]	COM
101 Neenah Printing (Menasha Corp.), Neenah, WI	32,020	30,250	+ 6	309	103,620	3	41,21,0,4[2],16[3]	COM

ry ts	CEO	Years in Business
	A.J. Clegg	11
	K.W. Field	17
	R.D. Hughes	20
	F.E. Simon	124
	W.L. Hart	80
	G.A. Whaling	15
	H.S. Goldman	7
C	J.W. Castro	22
T	D.H. Bracken	41
	M. Weissman	120
	J.J. Frautschi	100
	R. Sanderson	44
	F.E. Schmitt	54
	J.B. Thebault	36
	W.F. Vernon	88
	J. Torinus	41
	R.H. Barnhard	73
	J.E. Spenlnhauer III	50
	P.F. Mack	89
	D.M. Alloway	45
	J.W. Knapp	24
	M.H. Edwards	97
	J.C. Wurst	53
	R.C. Sheridan	75
T	J.R. Arriola	25
	C.N. Madison	37
C	T. Adler	66
	C.J. Eberts Sr	34
	J.B. Williamson	106
	J.A. Pentecost	21
	M. Previdi	44
	S. Bortner	2
	R. Ciavola	12
	W.M. Passano Jr.	100
	S.J. Kukla Jr.	26
	R.A. Ebel	51
	S.B. Pearlman	23
	F. Stillo	27
C	R. Lane	100
	R.E. Murphy	83
C	R. Block	22
C	E.J. Flynn II	42
	F. Cappetta	62
T	T.N. Rosenthal	122
N	L.S. Daniels	110
	R. Gombach	50
	D.C. Bishop	56
	K. King	39
	H.M. Sayers	78
	F.D. Mosher	124
	M.A. Krieger III	160
	W. Drew	90

GREETING CARD PRINTERS

Rank, Name, Location	Sales Most Recent Fiscal Year (000)	Change (%)	Employees	CEO
1 **Hallmark Cards**, Kansas City, MO	$2,500,000	+ 9	21,500	I.O. Hockaday
2 **American Greetings**[1], Cleveland, OH	1,380,984	+ 8	20,500	M. Weiss
3 **Gibson Greetings**, Cincinnati, OH	465,000	+15	4,500	B.J. Sottile

COLOR TRADE SHOPS

Rank, Name, Location	Sales Most Recent Fiscal Year (000)	Change (%)	Equipment: Scanners	Equipment: Color Pagination Systems	CEO
1 **Applied Graphics Technologies**, New York, NY	$111,000**	+ 11	19	18	F. Drasner/ S. Server/ P. Faucetta
2 **Techtron Imaging Network**[1] (Wace Group, London), Chicago, IL	106,700	+ 16	31	35	J.J. Collins
3 **Jannock Imaging**, Toronto, Ont.	94,138	+ 24	6	10	W.H. Batten/ J. Lane
4 **Parkway USA**[1] (Parkway, London), New York, NY	79,000**	+ 5	9**	5	P. Ross
5 **Black Dot Graphics**[1] (Devon Group), Crystal Lake, IL	76,558	0	6	8	J.W. Dinzole
6 **American Color** (Sullivan Graphics), Phoenix, AZ	68,000**	+ 24	28	16	D. Brazell
7 **Schawk Companies**, Des Plaines, IL	62,200	+ 12	17	11	C.W. Schawk
8 **Lanman Companies**, Washington, DC	45,000**	+ 53	12	4	B.B. Cunningham
9 **Enteron Group**, Chicago, IL	44,000	+ 10	6	3	J.J. Reilly
10 **Color Associates**, St. Louis, MO	28,000	+ 27	3	3	C.W. Bauer
11 **Magna Graphic Inc.**, Lexington, KY	22,800	+ 30	5	3	K. Engle
12 **Kwik International Color**, New York, NY	20,500	+ 8	2	2	R.J. Sirota
13 **H&S Reliance Ltd.**, Toronto, Ont.	19,255	+ 13	2	3	J.A. Davidson
14 **Phototype Color Graphics**, Pennsauken, NJ	17,900	– 1	3	4	J. Rubin
15 **Blanks Color Imaging**, Dallas, TX	17,679	+ 6	5	0	L. Blanks
16 **NEC Inc.**, Nashville, TN	17,600	+ 20	3	4	R.W. Luckett
17 **Lincoln Graphics**, Cherry Hill, NJ	17,300	– 12	5	2	R.C. Drum
18 **Herzig Sommerville**, Toronto, Ont.	17,125	– 1	5	7	E. Herzig

[Editor's Note: Ongoing company consolidations, the merging of international operations, and the changing nature of the graphic arts prepress business makes it impossible to compile comparative information for this listing. In several cases, the companies cannot isolate revenues for color separation services only; thus, revenues may also include typesetting, color retouching, custom photo processing, electronic prepress services, and printing.]

EXPLANATION OF ABBREVIATIONS

COM	Commercial Printing	SPC	Specialty
PUB	Publications	INS	Inserts
BK	Books	FIN	Financial Printing
CAT	Catalogs	DIR	Directory Printing

FOOTNOTES

1 Publicly held
2 Letterpress
3 Flexo press
4 Screen press
5 Diecutting
6 Gold leaf press
7 Sheetfed intaglio
8 Forms press
9 Coaster press
10 Cameron belt press
11 Coater
12 Specialty press
* Information not available
** Estimated

graphic
arts
monthly

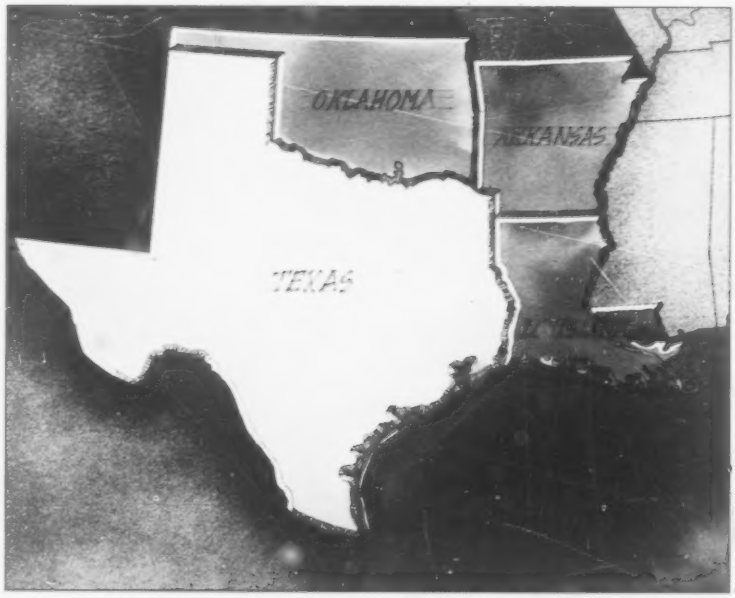
West South Central Region

It seems a bit unfair to the other three states in this region, but what we really mean when we talk about this part of the country is "Texas and surrounding states". Texas represents about 60% of the region, measured either by land mass or population; it represents about 75% of its printing industry. The others, in order of their share of regional printing volume, are Oklahoma (10%), Louisiana (8.7%), and Arkansas (7.2%).

There was a time, eight or nine years ago, when everybody thought this region was going to be the economic powerhouse of the nation by now. That's because this is the oil patch, and when the price of oil went to more than $30 a barrel, wells that had been plugged for years as money-losers suddenly became very, very profitable.

Then the bottom fell out of the oil business. *Then* it turned out that the local financial community had been playing demolition derby, using banks instead of old cars, and the bottom fell out of just about everything else. That golden age when real estate appreciated 30% a year and the biggest Rolls-Royce dealership in the world was in Midland, Texas, overnight became a rapidly fading memory.

There's a lesson here, but I doubt that anybody's learned it. The market for restraint is, well, sluggish down there, to put it nicely. Meanwhile, over most of the region things are picking up.



Not that any of these states is really rich; the behavior of moneyed Texans is of course legendary, but they're balanced by a lot of the nonrich. All four states are below the national average for per-capita income (Louisiana and Arkansas are far below it). Since much of the imploded S&L industry was down here, changes in bank deposits don't tell us much.

All in all, prospects seem pretty good for this region. They're gaining in population, their economies are diversifying, and there's a general sense that the worst is over. The food's awful good, too.

Data for these reports come primarily from Printing Industries of America, the National Association of Printers and Lithographers, the U.S. Bureau of the Census, Trade and Technology Press of Stamford, Conn. (the publishers of *Printmarkets*, a highly useful source of industry data) and Graphic Arts Monthly's own database.

Reprints of this installation of the Geography of Print may be ordered from Holly Hoffman, GRAPHIC ARTS MONTHLY, 249 W. 17th St., New York, NY 10011.

By Peter Johnston
Special Projects Manager

Regional Overview

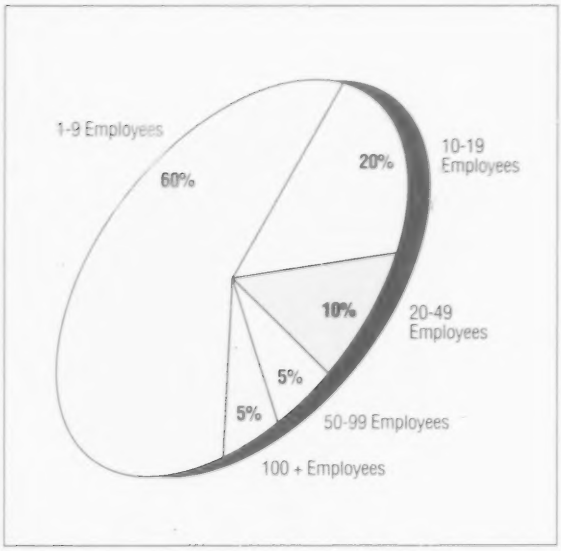
Note that these figures, taken from the GAM database, reflect the universe of printers in its widest sense. In most of the data on the next three pages, a smaller—though still very large—universe of printers will be used. This is because we will be concerned with the way the printing industry in the West South Central region is divided up in terms of markets. This requires us to exclude newspapers, in-plant printers, and certain other plants. These folks, while clearly printers, are not *economically measurable* as printers.

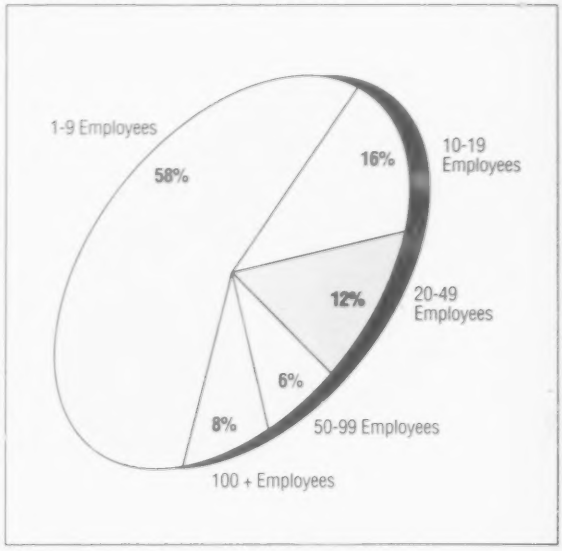
West South Central, Plants by Employee Count

Size	# of Plants	% of Region
1–9 Employees	2,174	60%
10–19 Employees	601	20%
20–49 Employees	371	10%
50–99 Employees	198	5%
100 + Employees	199	5%
TOTAL	**3,543**	**100%**

United States, Plants by Employee Count

Size	# of Plants	% of Total
1–9 Employees	29,815	58%
10–19 Employees	8,381	16%
20–49 Employees	6,428	12%
50–99 Employees	3,147	6%
100 + Employees	3,846	8%
TOTAL	**51,617**	**100%**





Charts and graphs by Lisa Hilgers

Plants by Function

Overall, the West South Central region accounts for about 7.5% of the total U.S. industry, as measured by value of shipments (gross sales). There is more business form activity in the region than that, and fewer converters and trade printers.

Function	# of Plants	% of U.S. Total
Commercial	1,952	7.5%
Newspaper (w/ Commercial)	138	8.5%
Newspaper (w/o Commercial)	182	8.0%
Book & Pub	138	5.4%
Business Forms	72	9.2%
Converters	82	4.4%
Noncommercial	466	6.1%
Trade	194	4.5%
Quick Printers	319	7.0%

Equipment Distribution

Equipment	Sites in Region	% of U.S. Total
Color Scanners	146	5.6%
Sheetfed Presses	2,649	11.2%
Heatset Web Offset Presses	236	6.2%
Folders	2,282	7.4%

These figures represent not pieces of equipment but sites where that equipment can be found. The high number for sheetfed presses means that they are divided up among a larger number of smaller shops than the national norm. Otherwise, equipment distribution corresponds very closely to the distribution of gross printing sales in the region. Note that this is not always the case, especially in regions containing a disproportionate number of very large sites.

Commercial Printing

Value of Shipments

Because of their relative populations, the printing industry in these states comes in two sizes: large (Texas) and small (the others). Texas, in fact, has close to three-fourths of the region's printing revenues. Size aside, unlike the north-south dispersion we've seen in other regions, these states are economically fairly similar. The differences among them are differences in degree, not in kind.

State	Sales	%
Texas	3,800	74.1%
Oklahoma	516	10.0%
Louisiana	446	8.7%
Arkansas	368	7.2%
TOTAL	5,130	100%

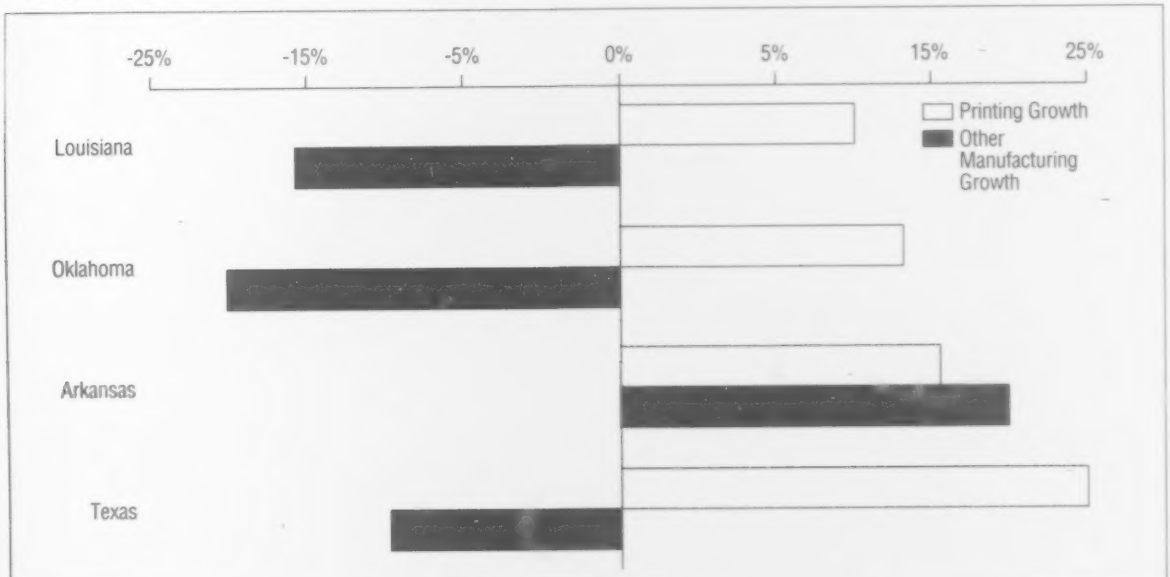
Printing Sites

State	Sites	%
Texas	2,219	69.4%
Oklahoma	418	13.1%
Louisiana	372	11.7%
Arkansas	185	5.8%
TOTAL	3,194	100%

The distribution of printing sites, not surprisingly, closely reflects the distribution of sales volume (value of shipments). Texas has a larger share of sales than of sites, meaning that on average it has somewhat larger printers. That's because it has large cities. Forget the wide-open-spaces mythology. Texas is now an urban state; 80% of its population lives in metropolitan areas, vs. 60% for Louisiana, 55% for Oklahoma, and only about 38% for Arkansas.

Printing industry employment has increased in all four states; in Texas it's up 25% (measured 1982-1988). Arkansas has even seen a 20% increase in non-printing manufacturing for the period, close to a national record. Arkansas was the least oil-dependent of these states; it is also the poorest.

Printing Employment



Industry employment, by state, is almost exactly proportional to value of shipments. Texas again is the overwhelming leader in the region, followed by Oklahoma, Louisiana, and Arkansas in one clump. Looking at the data on industry employment growth, we see that Louisiana was hardest hit by the oil bust and has recovered the most slowly.

State	Employees
Texas	43,051
Oklahoma	5,527
Louisiana	4,983
Arkansas	3,935
TOTAL	57,496

Leading Printers in Major Markets

Company	Location	Sales
BUSINESS FORMS PRINTERS		**Total 449.2**
Bowater Computer Forms, Inc.	Plano, TX	137.0
Ennis Business Forms, Inc.	Ennis, TX	113.0
Texas Stock Tab	Coppell, TX	95.0
Norick Brothers, Inc.	Oklahoma City, OK	24.0
Hart Graphics, Inc.	Austin, TX	17.0
Central States Business Forms	Dewey, OK	13.2
Royal Business Forms, Inc.	Arlington, TX	12.0
Castle Multiforms, Inc.	Shreveport, LA	12.0
International Business Forms	Little Rock, AR	11.0
All-States Business Products	Carrollton, TX	8.0
All-States Business Products	Grand Prairie, TX	7.0
INSERT PRINTERS		**Total 285.5**
Retail Graphics Printing	Dallas, TX	41.5
Century Graphics Corporation	Metarie, LA	34.0
Newspaper Enterprises Inc.	Dallas, TX	26.5
Oklahoma Graphics	Oklahoma City, OK	25.0
GBP Industries	Lufkin, TX	25.0
World Color Press, Inc.	Stillwater, OK	20.0
Treasure Chest Advertising	San Antonio, TX	20.0
Treasure Chest Advertising	Grand Prairie, TX	20.0
Adplex, Inc.	Houston, TX	18.0
Greater Houston Publishers	Houston, TX	14.5
Nortex Press	Wichita Falls, TX	14.0
Maxwell Communications	Dallas, TX	10.0
The Printing Center	Fort Worth, TX	9.0
Hart Graphics, Inc.	Austin, TX	8.0
COMMERCIAL/SPECIALTY PRINTERS		**Total 260.0**
Clarke Checks	San Antonio, TX	53.0
Taylor Publishing Co.	Dallas, TX	40.5
The Riverside Press, Inc.	Dallas, TX	22.5
Williamson Printing	Dallas, TX	16.5
Weldon Williams & Lick, Inc.	Fort Smith, AR	16.0
Optigraphics Corporation	Grand Prairie, TX	16.0
Horticultural Printers, Inc.	Mesquite, TX	14.0
Texas Stock Tab	Coppell, TX	10.0
Heritage Press, Inc.	Dallas, TX	10.0
International Graphics	Little Rock, AR	10.0
Creative Printing	Little Rock, AR	8.0
Hart Graphics, Inc.	Austin, TX	8.0
American Printers	San Antonio, TX	7.0
Hurst Printing	Dallas, TX	6.0
Wetmore & Company	Houston, TX	5.0
Charles P. Young Company	Houston, TX	5.0
Blanks Engraving Company	Dallas, TX	5.0
F. L. Motheral Printing	Ft. Worth, TX	3.0
Norick Brothers, Inc.	Oklahoma City, OK	2.5
Harvey Press, Inc.	New Orleans, LA	2.0
MAGAZINE PRINTERS		**Total 257.3**
World Color Press, Inc.	Stillwater, OK	45.0
Maxwell Communications	Dallas, TX	40.0
Ringier America, Inc.	Jonesboro, AR	30.0
GBP Industries	Lufkin, TX	25.0
American Signature Graphics	Dallas, TX	21.8
Gulf Printing Company	Houston, TX	20.0
The Lehigh Press, Inc.	Dallas, TX	15.0
Democrat Ptg. & Litho	Little Rock, AR	13.0
PennWell Printing Company	Tulsa, OK	13.0
The Lehigh Press, Inc.	Carrollton, TX	12.0
Treasure Chest Advertising	San Antonio, TX	10.0
Hart Graphics	Austin, TX	5.0

Demographics in West South Central

Population and Migration

State	Population	Rank	Migration (See text.)	Change (%, 80-86)
Texas	16,685,000	3	1,331,000	17.3
Louisiana	4,501,000	18	8,000	7.0
Oklahoma	3,305,000	25	120,000	9.2
Arkansas	2,372,000	33	10,000	3.8
TOTAL	**26,863,000**		**1,469,000**	

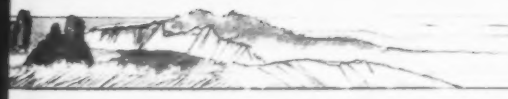
Potential Labor Pool

State	Age 15-24 (% Population)	Unemployment Rate (%)
Louisiana	18.5%	13.1
Texas	17.8%	8.9
Oklahoma	16.8%	8.2
Arkansas	15.8%	8.7

The figure for migration is a particularly important one; it shows what is really happening to a state's population once the birth and death rate are factored out. This figure represents the number of people who have moved in or out from or to somewhere else. Unlike other regions, the West South Central has a positive migration figure.

There are two important factors in the unusually high migration figure for Texas. One factor is the population that moved down to share in the boom and stayed to share in the bust. (At least it was warm, and they were no worse off than they'd been before.) The other factor is that Texas, with more than 1,000 miles of southern border, receives large numbers of immigrants from Mexico and Central America, many of whom remain in the state.

All four of these states have among their population a sizable pool of potential labor, having both large contingents in the 18 to 24-year-old age bracket and unemployment rates above the national average. High unemployment doesn't sound like a plus, but in some ways it is. In



WEST SOUTH CENTRAL

Tables of leading printers given in order of overall market size. This will vary from region to region.

Company	Location	Sales
Colorgraphics	Tulsa, OK	4.5
F.L. Motheral Printing	Ft. Worth, TX	3.0
DIRECTORY PRINTERS		**Total 129.5**
GTE Directories Corporation	DFW Airport, TX	85.0
Gulf Printing Company	Houston, TX	31.0
The Printing Center	Fort Worth, TX	13.5
CATALOG PRINTERS		**Total 116.0**
Ringier America, Inc.	Jonesboro, AR	35.0
Oklahoma Graphics	Oklahoma City, OK	17.0
The Lehigh Press, Inc.	Dallas, TX	15.0
Hart Graphics, Inc.	Austin, TX	7.0
Colorgraphics	Tulsa, OK	5.5
PennWell Printing Company	Tulsa, OK	5.0
American Signature Graphics	Dallas TX	5.0
GTE Directories Corporation	DFW Airport, TX	5.0
Gulf Printing Company	Houston, TX	5.0
Maxwell Communications	Dallas, TX	5.0
F.L. Motheral Printing	Ft. Worth, TX	5.0
Royer & Schutts	Fort Worth, TX	3.5
The Lehigh Press, Inc.	Carrollton, TX	3.0
ADVERTISING PRINTERS		**Total 98.0**
The Riverside Press, Inc.	Dallas, TX	18.0
Williamson Printing	Dallas, TX	14.0
Royer & Schutts	Fort Worth, TX	9.0
Bennett Printing	Dallas, TX	8.5
Wetmore & Company	Houston, TX	8.0
Heritage Press, Inc.	Dallas, TX	7.0
F.L. Motheral Printing	Ft. Worth, TX	7.0

Company	Location	Sales
Hurst Printing	Dallas, TX	6.5
American Printers	San Antonio, TX	6.0
Harvey Press, Inc.	New Orleans, LA	5.0
International Graphics	Little Rock, AR	5.0
Democrat Ptg. & Litho	Little Rock, AR	4.0
FINANCIAL/LEGAL PRINTERS		**Total 76.0**
Clarke Checks	San Antonio, TX	60.0
Charles P. Young Company	Houston, TX	10.0
Norick Brothers, Inc.	Oklahoma City, OK	6.0
DIRECT MAIL PRINTERS		**Total 37.0**
Adplex, Inc.	Houston, TX	12.0
Century Graphics Corporation	Metarie, LA	10.0
Oklahoma Graphics	Oklahoma City, OK	8.0
Williamson Printing	Dallas, TX	7.0
PREPRESS		**Total 31.0**
Wilson Engraving Company, Inc.	Dallas, TX	14.5
Blanks Engraving Company	Dallas, TX	12.0
Williamson Printing	Dallas, TX	2.5
Hart Graphics, Inc.	Austin, TX	2.0
LABEL/WRAPPER PRINTERS		**Total 19.0**
MPI Label Systems	Grand Prairie, TX	10.0
Graphic Arts	Ft. Worth, TX	9.0

Figures given for sales are in millions of dollars. Data taken from Printmarkets, Trade & Technology Press, Stamford, Conn.

If you'd like to rent the list of names of people in any of the printing establishments in this section, please contact Jim Long, Direct Mail Services, Cahners Publishing, 249 W. 17th St., N.Y., N.Y. 10011, or call 1-800-537-7930.

Educational Attainment

State	High School (12+ years)	College (16+ years)
Oklahoma	66.0%	15.1%
Texas	62.6%	16.9%
Louisiana	57.7%	13.9%
Arkansas	55.5%	10.8%

Income and Bank Deposits

State	Income (Per Capita)	Rank	Bank Deposit Increase 1985–1986, %
Texas	$10,373	23	3.1%
Oklahoma	9,754	33	−8.7%
Louisiana	8,836	40	3.4%
Arkansas	8,389	48	3.1%
U.S. Average	10,797		9.0%

the East there are large printing plants with workforces over an average age of 35 located in counties with unemployment rates of less than 2%. It may be tough to train untrained workers, but it's not as tough as trying to hire workers that don't exist.

As to educational attainment, these states hover somewhat below the national norms. Oklahoma is slightly ahead in percentage of high-school graduates; in college graduates, the states fall in the same order they do for most things. Texas, at 16.9%, is slightly above the national average, in fact, which won't surprise anyone who's ever tried to find a parking place in Austin. Some years it seems like everybody in the Southwest who isn't otherwise gainfully employed is a student at the University of Texas.

Per-capita income figures mirror other statistics for the region, ranging from the most urban and industrialized state, Texas, to the most rural and agricultural one, Arkansas. This pattern, incidentally, repeats itself over and over across the country.